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ABSTRACT

Swedish consumer use of video recording equipment and software was surveyed through interviews with 10,700 people; the interviews were conducted by the field research staff of the Swedish Broadcasting Corporation's Audience and Programme Research Department between December 1981 and April 1982. The study focused on possession (ownership, leasing, rental) of recordings and cassettes, and on usage (recording off-air programs and playing ready-made or home-recorded cassettes), to determine how various subgroups use video. Video usage in relation to Swedish television services was emphasized. Results show a near doubling of video consumption since a similar survey in May 1981. Possession is unevenly distributed among the population with age, place of residence, and sex the principal determinants. Young men residing in urban areas show the highest average density of possession. While personal collections grow rapidly during the first 2 years of owning a video, interest in renting ready-recorded cassettes declines equally rapidly. Video viewing has not affected the volume of television consumption, which has also shown an increase since the earlier survey. (LMM)

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VIDEO USE IN SWEDEN

1982

OLOF HULTÉN

(SUMMARY of SR/PUB report no. 16-1982)

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VCR USE IN SWEDEN

The Swedish Broadcasting Corporation (SR) undertook its first major investigation of Swedish consumers' use of video recording equipment and software in May of 1981[1]. This initial study was subsequently followed up in a second survey on roughly the same lines during the Winter and Spring of 1981/1982. All told, some 10.700 persons were interviewed in three waves between December of 1981 and April of 1982. Of these respondents, somewhat less than 1.100 had access to VCR in their homes. The interviews were carried out by the field research staff of SR's Audience and Programme Research Department (PUB).

The present report offers data on (1) Swedish households' possession (ownership, leasing, rental, etc.) of recorders and cassettes, and (2) usage, i.e. recording off-air and playing cassettes (either ready-made cassettes or home recordings).

As in the initial study, we have examined how various demographic subgroups make use of video. This second study confirms the impressions we gained in 1981. As the follow-up also includes non-owners' use of video[2], we can now say something about total use in the country.

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1) O. Hultén, M. Wachtmeister. Video in Sweden 1981. Stockholm, SR/PUB no. 19-1981.

2) "Ownership" here includes leasing or short-term rental. "Non-owners", in other words, are persons who do not have VCR in their homes.

Many aspects of the new medium are interesting, and our data permit analyses from several perspectives. Nevertheless, the prime emphasis in this study - as in the initial survey - remains on video usage in relation to Swedish television services.

THE VIDEO MARKET IN SWEDEN, 1982

Some 325,000 cassette recorders were to be found in Swedish households at the end of the second quarter. Demand for VCR has subsided, and the prognosis for 1982, sale of 185,000 new recorders, now seems optimistic.

Blank cassette sales for 1982 are estimated at approximately 2.5 million. An excise tax of 0.25 crowns/minute playing time (viz. 30 crowns for a two-hour tape) has been imposed with effect from 1 September. Software distributors have also signed an agreement with the government and the Swedish Film Institute that will impose a fee of 40 crowns on each rental cassette in distribution. These revenues will be used by the Institute to support Swedish film production.

Rentals have been estimated at about three per video household per month. Prices for rental films vary widely, with an average price of 25 crowns. In that case, the volume of rentals for 1982 would amount to approx. 300 million crowns.

Some 3,500 titles are on the market today, pornography being the largest single category, with 35 percent. Some forty distributors are operating through

over 3,000 outlets throughout the country. Of these, one-third are special "video boutiques", one-third are radio/TV dealers, and the remaining one-third miscellaneous outlets (press kiosks and tobacconists, stores, petrol stations and grocery stores). The largest single retailer is Pressbyrån AB, a nationwide chain of press kiosks.

The rental market is highly competitive, and many retailers show little or no profits. A large share of retail outlets will most likely disappear in the near future, and prices will rise somewhat. There is little piracy in Sweden today.

FINDINGS

The data presented in the appended tables may be summarized, as follows:

Possession of VCR and cassettes

A quantum jump in the market penetration of video hardware occurred during the latter two quarters of 1981, up to early December. Household possession nearly doubled during this period, but since then growth has been modest. In April of 1982, eleven percent of the population (nine percent of the households) had access to VCR hardware in their homes. This represents slightly less than 800,000 persons between the ages of 9 and 79 years (See Table 1).

Possession is very unevenly distributed among the population, with age, place of residence and sex the principal determinants, in order of mention. Young men residing in urban areas show, on average, the highest

density of possession: approx. 25 percent. In view of the fact that young people tend to watch video as a group activity[1], we may conclude that video already reaches practically all those teens and young adults who are interested in it. (See Table 2)

A question outside the scope of our previous study is whether persons with access to video in their homes accumulate personal cassette libraries. Neither can this second survey answer the question fully, but it does allow us to compare the number of cassettes accumulated during the first two years of VCR possession with the average size of cassette collections among persons who have had video longer than two years. After six months' possession the average VCR owner has acquired about six cassettes; one year later the figure is about thirteen. Those who have had their VCR longer than two years have no more than an average fifteen cassettes.

Whereas people's personal collections of cassettes grow rapidly the first two years, their interest in renting ready-recorded cassettes declines equally rapidly. Fully thirty percent of those who had had video less than a month reported having rented cassettes in their home at the time of the interview. Among persons who had had video six months the share was fifteen percent, and among those who had had video two years, eight percent. Generally speaking, the propensity to rent cassettes would appear to be inversely related to age and level of education.

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1) According to a study conducted by Skandinaviska Marknadsinstitutet (SMI) for Biografstatistik AB in March-April of 1982, two out of three young people between the ages of 15 and 24 years watch video in groups of four or more persons.

Home recording

Compared to May of 1981, more people report not making home recordings. (See Table 3) Nearly all (approximately ninety percent), however, report recording television programmes. The comparison is perhaps somewhat distorted by the large numbers of new owners - by purchase, lease or short-term rental - in the December-January wave of interviews. The other difference between May of 1981 and April of 1982 is that other members of the household besides the respondent now record programmes. This change may in part be attributed to the fact that households with video are larger on average than they were in 1981.

Four out of ten persons were not at home when they made their most recent recording. Fifteen percent were at home, but were otherwise occupied. Highly educated respondents report using video to free themselves from programme schedules more than other groups; approx. 75 percent were busy doing something else when they last recorded a programme. The youngest category, 9- to 14-year-olds, are generally at home and, furthermore, generally also watch the programmes they record. (See Table 4)

Frequency of use

Five percent of the population (or 350,000 persons) watch video the average day[1)]. Of these, a majority have VCR in their homes, and the rest watch video in the homes of friends and family. Video viewing is most common among young persons ages 15 to 24 years; ten

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1) SR/PUB measures media consumption through telephone interviews. Respondents were asked to specify the previous day's video viewing.

percent of this group report watching video daily. (See Table 6) Nine- to fourteen-year-olds come a close second with nine percent reporting daily viewing. Teens and young adults (15 to 24 years) account for one-third of all video viewing.

Approx. fifteen percent of the population, or more than one million Swedes, watch video sometime during the average week. More than half of these people do not have VCR in their homes. (See Table 5) In the course of a week roughly one-third of the population under the age of 24 manage to watch video at least once. The corresponding share among 25- to 44-year-olds is seventeen percent, and six percent of those over 45.

During the Winter and Spring of 1981/82 half the video viewers any given day watched recorded television programmes, while the remainder watched rented films. As noted earlier, three factors play a major role here: age, whether or not one has VCR in the home, and the length of VCR possession. Non-owners among 15- to 24-year-olds account for the greatest share of rental films (80 %), while owners aged 45 or over account for eighty percent of recorded television programmes.

Video viewers watch ninety minutes a day on average. Their video consumption is largely above and beyond their television consumption, inasmuch as video viewers consume the same amount of television on average as non-video viewers. Once again we find that 15- to 24-year-olds constitute a special case: among this group we find more video consumers who refrain from watching television than non-video viewers of the same ages. Younger and older video viewers, by contrast, appear somewhat more interested in television fare than non-video viewers of the same ages. Fewer video

viewers totally abstain from television, and heavy consumers of television are at least as common among video viewers as in the population as a whole.

As for our respondents' choice of rental films, we find that about one in ten films is Swedish, half of which are films for children. Action-adventure dominates the rental film diet. Among the television fare viewed on video, series/serials, drama, entertainment, children's programmes and feature films together account for more than two-thirds. Cultural and nature programmes were not mentioned at all, while politics and current events - including newscasts - account for a bit less than ten percent. (See Table 7) A good share of home recording are Swedish entertainment and music programmes. Such content, if it were available on the video market, would pose a good counterweight to the foreign dominance among rental films. Interest in informative programmes, on the other hand, seems cool, and making such content available on the cassette market would most probably prove a costly venture.

DISCUSSION

Among the most salient findings of this second survey of VCR usage in Sweden is a confirmation of upper teens' and young adults' very special behaviour vis-à-vis the medium. Rental films dominate their use of VCR, and they are the only age group in which even a majority of persons with access to VCR in their homes view rented films. Otherwise, the balance tends to shift over to recordings of TV fare with greater age and higher levels of education. On the whole, persons with video in their homes view recorded television programmes more than those who view video in others'

homes. The longer a person has had VCR, the greater the share of recorded television programmes. Whereas 15- to 24-year-olds who watch video tend to abstain from television more often than non-video viewing youth, the situation tends to be the opposite among video viewers in other age groups, especially those over 45.

SR's first study was met with a certain scepticism and charges that the corporation was merely out to protect its monopoly interests. It is quite obvious, critics said, that people who acquire VCR turn their backs on TV. If SR's researchers ever left their offices and took a look at reality, they would see the truth of this as plain as the nose on their faces!

One's look-out point is naturally an important factor when trying to orient oneself. A video boutique affords one view of reality,but not much perspective. SR's and other studies indicate that young people's behaviour is not typical of video consumers in general. Moreover, recent acquirers of video behave differently than those who have had their recorders some time. One can hardly draw any conclusions about <u>total</u> video usage on the basis of these two groups.

SR's survey method affords a good overview of VCR usage in Sweden and its effects to date on television consumption. To the extent the findings of the study can be used as a basis for long-term prognoses, analysts should focus their attention on the behaviour of those who have had video in their homes for some time. As noted above, renting of films apparently loses its appeal after the first few months. Future advances in VCR market penetration in Sweden will increasingly take place among older age groups, among whom access to video today is sparse. Middle-aged and

elderly groups today show a relatively cool interest in film rentals, but use VCR to record television programmes.

So far, there is no indication that video viewing has affected the volume of television consumption. Although the total volume of video consumption has doubled since 1981, television consumption also shows an increase, not a decline. Since half of all video consumption (and an even greater proportion among video owners) is postponed or repeated TV viewing, one can be confident in the assessment that the growth of video in Sweden has enhanced, and will continue to enhance, the availability of television programming and thus the profit and enjoyment the public derive from television.

Table 1: Access to video in the home. % households and % population aged 9-97 years

	Number VCR ('000)	% households (N=3.4 mill)	% pop. 9-79 yrs. (N=7.1 mill*)
1978 (Dec.)	40	1	no data
1979 -"-	70	2	no data
1980 -"-	120	3.5	4
1981 -"-	285	8.5	9
1982 (April)	310 (approx.)	9	11

*) Based on SR/PUB surveys

Table 2: Possession of video, by age. % shares

Age	9-14	15-24	25-44	45-64	65-79
March 1981	6	6	7	4	1
March 1982	16	16	14	5	1

Table 3: Home recordings of TV fare. %

Has recorded TV programmes	Spring 81 (N=457)	Win-Spr 81/82 (N=1,078)
No	4	11
Yes, respondent personally	52	39
Yes, respondent and other(s) in household	29	36
Yes, other(s) in household	15	13

Table 4: What were you doing when you last recorded a television programme?
(%, Winter-Spring 1981/82)

I was	Dec/Jan (N=293)	Feb/Mar (N=314)	April (N=208)
Don't know	2	3	1
Away from home	37	43	45
Home	60	54	54
- and watched the programme	30	25	26
- and watched the other channel	11	13	10
- but did not watch tv	18	14	12
- but can't recall activity	1	2	6

Table 5: Have you watched video this past week? Did you watch video yesterday? Some other day?
% shares

Last watched video	HAVING VIDEO IN THE HOME				NO VIDEO
	Ave. Win-Spr. 81/82	Dec/Jan 81/82	Apr 82	May 81	Average Win-Spring 81/82
The past week	67	75	67	53	9
Yesterday	29	35	33	16	2
Don't know	0	0	0	1	
Have never watched					44
N =	1,078	417	251	457	9,603

Table 6: % share of total population who watched video the average day, by age. Winter-Spring 1981/82.

	AGE					
	9-14	15-24	25-44	45-64	65-79	Tot.
Watched video yesterday	9	10	5	2	0	5
Did not watch	91	90	95	98	100	95
N =	1.073	1.709	3.530	2.798	1.571	10.681

Table 7: TV programmes watched on VCR Dec 1981 - April 1982

Programme category	N	%
News	2	1
Politics, current events	19	8
Culture	-	-
Nature, natural sciences	-	-
Feature films	37	15
Fiction: comedy, "real-life" settings	22	9
Fiction: adventure, "thrillers"	26	11
Entertainment (variété etc)	46	19
Music	25	10
Sports	17	7
Children's programmes	37	15
Other; Don't know	10	4
	241	99